Situation Report: NATO goes shopping

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Situation Report

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By Rishi Iyengar and John Haltiwanger

Hello from Ankara for a special NATO summit edition of *Foreign Policy*'s Situation Report.

Here's what's on tap for the day: **NATO spends** big bucks, **Ukraine wins** more admirers, and Belgium's defense minister discusses that **World Cup victory**.

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'Billions, Literally Billions'

NATO Secretary-General Mark Rutte, center, poses for a group photo at the NATO Summit Defense Industry Forum, on the sidelines of the NATO leaders' summit in Ankara, Turkey, on July 7. *Serdar Ozsoy/Getty Images*

U.S. President Donald Trump likes big numbers. He also doesn't like NATO—as he has repeatedly made it known ahead of the alliance's annual summit in Ankara, Turkey, which began on Tuesday.

So NATO put out some really big numbers just hours before Trump touched down in the Turkish capital, announcing defense investments worth "billions, literally billions" (in the words of NATO Secretary-General Mark Rutte) by countries across the alliance. That includes a commitment to invest $40 billion in counter-drone capabilities over the next five years, investments in integrated air and missile defense worth more than $26 billion, and new strike capabilities worth $1.6 billion.

While several of the companies making those deals were from the United States—including established bigwigs Lockheed Martin and Raytheon as well as emerging bigwigs Palantir and Anduril—there were also several European companies such as Germany's Rheinmetall, France's Airbus, Sweden's Saab, and Turkey's Aselsan.

Rutte presented the investments as starting to deliver on the spending targets that member countries committed to under pressure from Trump at last year's NATO summit in The Hague. "One year ago in The Hague, allies committed to invest a lot more in defense—5 percent of GDP by 2035," Rutte said while announcing the investments. "And here we are now, one year later in Ankara, already delivering results."

This year's summit is "about making sure that all the allies put their money where their mouth is," Swedish Defense Minister Pal Jonson told SitRep. "What we need right now, the absolutely most crucial thing, is to ramp up production so we can transform this massive defense investment into combat power," he added.

A 'good start.' But the persistent question is whether it will be enough to keep Trump onside. The U.S. president continued to criticize NATO even after arriving in Ankara, complaining about allies' lack of support in the U.S.-Iran war. "I was very disappointed with NATO," Trump told reporters on Tuesday ahead of a bilateral meeting with Turkish President Recep Tayyip Erdogan. "Why are we spending hundreds of billions of dollars, and they're not there for us?"

U.S. Ambassador to NATO Matt Whitaker described the allies' financial commitments thus far as a "good start," adding that "some allies are doing better than others" in reaching the 5 percent target. "President Trump expects all allies to step up immediately," he told reporters in a briefing ahead of the summit.

So how much will it take to make the United States happy? Finnish Defense Minister Antti Hakkanen gave SitRep a slight smirk when we

asked him that. “Well, I think that’s the most crucial question in this summit,” he said. “We are on the right track. I know that the Americans are saying that the speed has to be a little bit faster—OK, but we are on the right track, and that’s why I think that President Trump and Mr. [U.S. Defense Secretary Pete] Hegseth from the Pentagon should be satisfied.”

Jonson of Sweden, which joined NATO in 2024 along with Finland (which joined in 2023) as the alliance’s newest members, also appeared amused by the question. “My job is not to make the U.S. happy,” he said. “I want a more balanced trans-Atlantic relationship. Addiction to U.S. military power is unhealthy for Europe, but it’s also unhealthy for the U.S.,” he added. “Now, the key is to make sure we transform this massive investment into concrete power, and we do it quickly.”

Tomorrow’s Agenda (all times local)

10:45 a.m. Welcome ceremony for visiting heads of state and government, hosted by Rutte and Erdogan.

11:00 a.m. Official family photo of NATO leaders.

11:15 a.m. Meeting of the North Atlantic Council of heads of state and government.

3:00 p.m. Rutte hosts a press conference.

(Trump will spend the afternoon holding bilateral meetings with Zelensky and Syrian President Ahmed al-Sharaa, followed by a press conference before he departs Ankara.)

The NATO-Ukraine Vibe Shift

At NATO summits in recent years, conversations on Ukraine often focused on how the country was outmatched by Russia and in desperate need of assistance. But this year, as Ukraine’s new strategy in the war has begun to turn the tide against Moscow—and as militaries around the world increasingly learn from Kyiv’s tactics in the fight—there’s a notable change in tone.

NATO allies have seemingly begun to view Ukraine more as an example to follow than a country in need of rescuing.

"It's been really interesting to see over the past few months the change in dynamic between Ukraine and Russia. There's a clear realization all over Europe, but also in [Washington,] D.C., [that] the difficulties are mounting on the Russian side," Tristan Aureau, director of the French Foreign Ministry's Center for Analysis, Planning, and Strategy, told SitRep.

"It's striking to see that, be it in the Gulf or in Europe, it's now Ukraine who's able to contribute to our security, and I think this realization is a big change in the paradigm as to how we see Ukraine as instrumental, and I would say central, to European security," Aureau said.

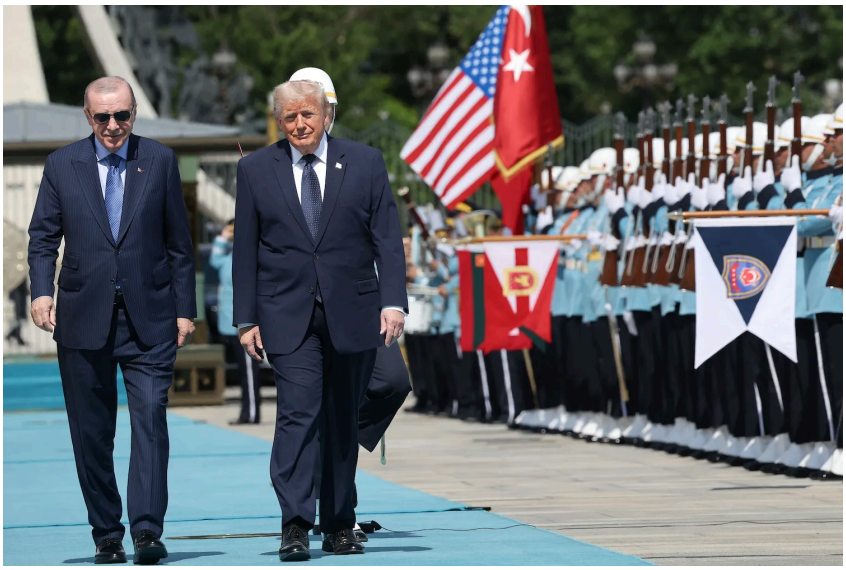
Europe has come a long way from "just supporting Ukraine" and seeing it as a "beneficiary of what we could deliver," Aureau added. "The fact is, Ukraine now has the most powerful, the best-trained army on the continent."

'Trump likes to back a winner.' Trump has also begun to speak about Ukraine in far more positive terms than in the past. SitRep asked U.S. Democratic Sen. Chris Coons, who is part of a bipartisan delegation of U.S. lawmakers at the summit, if he thinks this will last, given Trump's history of flip-flopping and criticizing Ukraine. "Predicting that anything President Trump has as a view or an opinion will last is dangerous work, but there's a couple of traits that President Trump has that you can reasonably predict as well," Coons said. "Trump likes to back a winner. He does not like to be associated with 'losers.'"

Trump has treated "[Russian President Vladimir] Putin not as a war criminal, not as someone who has carried out a horrific war of aggression, but as someone he respects," Coons said. But the senator said he believes "we're finally at a point" where Trump is "beginning to see that Putin likely cannot win, and that [Trump] is risking his reputation and his role by continuing to support him."

In the lead-up to the NATO summit, John spoke with Ukraine's ambassador to the United States about this shifting dynamic in the war and what Ukrainian President Volodymyr Zelensky plans to discuss when he meets with Trump on Wednesday in Ankara. Read the full interview here.

Snapshot



U.S. President Donald Trump (right) walks with Turkish President Recep Tayyip Erdogan during a state arrival ceremony at the Bestepe Presidential Complex in Ankara, Turkey, on July 7. *Win McNamee/Getty Images*

Hot Mic

SitRep caught up (again) with Belgian Defense Minister Theo Francken on the sidelines of the NATO Defense Industry Forum in Ankara on Tuesday. NATO relations and European defense were obviously a key topic we wanted to talk to him about.

But Belgium had also just come off a thumping 4-1 victory against the United States at the FIFA World Cup under controversial circumstances, with Trump having personally called FIFA boss Gianni Infantino to ask that the sport's governing body review U.S. star Folarin Balogun's red card suspension ahead of the game so that Balogun could potentially play against Belgium. FIFA did so and suspended the suspension, allowing Balogun to play. (Infantino insists that Trump's call did not influence the review's outcome.) Belgium appealed the decision, but FIFA dismissed the appeal.

And then Belgium won anyway.

Francken was stopped by two separate people to talk about the World Cup win as we walked to our interview space, and he apologized for stifling a yawn before explaining that he had been up watching the match at the Belgian ambassador to Turkey's residence until 5 a.m. local time. "Everyone's been talking about the World Cup" and congratulating him on Belgium's performance, he said. "Even the Americans."

Francken declined to be drawn into a discussion on Trump's intervention, only calling it a "bizarre maneuver" before quickly moving

on.

But he did expand on his criticism of Trump's recent comments about Italian Prime Minister Giorgia Meloni, with Trump claiming Meloni "begged" him for a photo at the G-7 summit in France (a claim she denied) and joking in a Truth Social post before flying to Ankara that he would need a "restraining order" against her.

"I think that it's not very good to have food fights all the time on, like, taking a picture or a photo together," Francken said. "I don't think it's very useful when you have to show cohesion and not division, because united we stand, divided we fall," he added. "I think that the only one drinking Champagne is Putin and the adversaries."

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